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Guide

for School Board Planning and Results Reporting

MARCH 2000

Alberta
LEARNING

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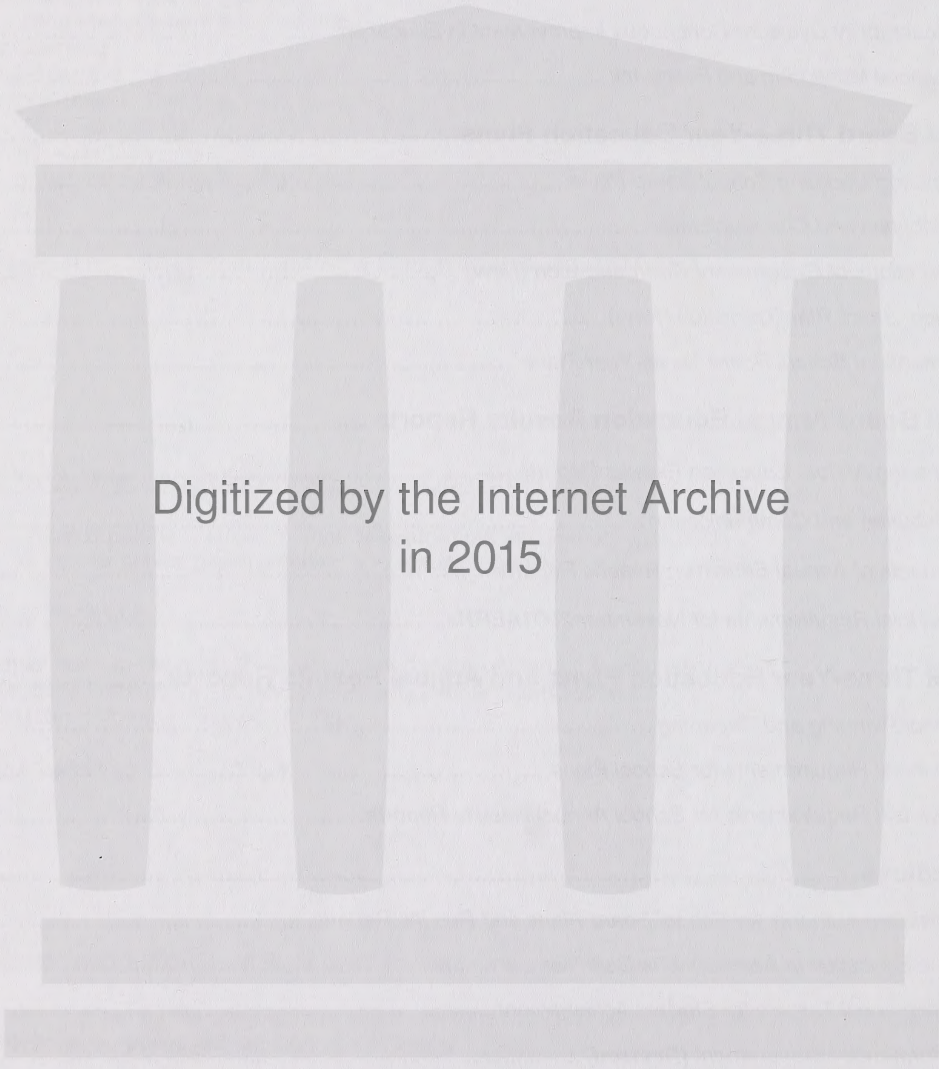

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What's New

The more significant changes to the planning and reporting guide since last year result from the creation of Alberta Learning. The business plan of the new Ministry identifies new goals and outcomes for the learning system that focus on the learner – life long learning and smooth transitions for learners. The guide recognizes the planning school jurisdictions have already done by providing a year for boards to make the transition to the new goal structure.

Other changes reflect new programs, such as the Alberta Initiative for School Improvement, and consultations, such as the School Facilities Task Force. The document has been streamlined in response to suggestions from the stakeholder advisory committee. Specific changes are highlighted below.

• Brief observation on implementation of the accountability cycle through school board plans.	p. 4
• Alberta Initiative for School Improvement	pp. 6, 7, 12, 18
• New goal structure for the learning system, including new terminology: the term "outcome" replaces "results".	p. 7- 8
• Development of mechanisms to enhance reporting on achievement of students who do not write provincial achievement tests.	p. 12
• Highlight linkage between three-year education plan and other jurisdiction plans: technology plan, long-range facilities plan, three-year capital plan and AISI projects.	p. 13
• Clarifies reporting of achievement test and diploma exam results in relation to provincial results and provincial standards. Board reporting must include jurisdiction results, provincial results and the provincial standard.	pp. 17, 22
• Teacher Growth, Supervision and Evaluation Policy	p. 17
• New goals for school plans	p. 21
• Target setting appendix updated	p. 28
• New text for Performance Measurement appendix	p. 30
• New appendix provides comparative provincial data on measures related to the provincial priorities for improvement.	p. 31

Note: in this document, new sections are identified in the sidebars.

NOTES:

Introduction

Purpose of guide

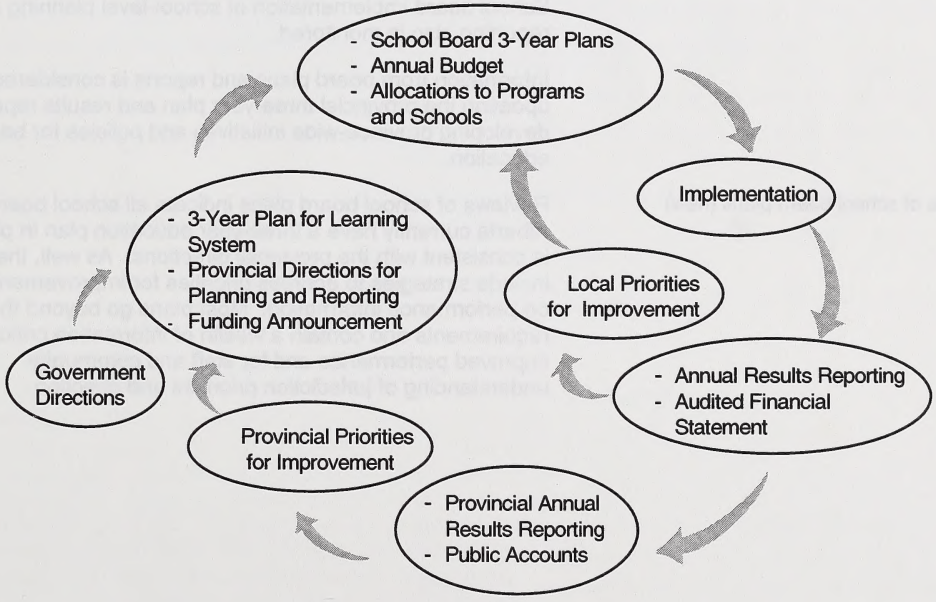
This guide outlines the requirements for school board three-year education plans for 2000/01 to 2002/03 and preparing annual education results reports for 2000 and 2001. (See Appendix 1, page 24 for the Legislative Authority for school board plans and results reports).

Purpose of school board plans and reports

School board planing and reporting on results are essential elements of the Accountability Framework for basic education as depicted below. The framework supports continuous improvement by enabling school boards to:

- Focus on improving education for students consistent with the *Definition of Basic Education* (see Appendix 2, pages 25-26)
- Address provincial directions and local needs
- Establish and act on priorities for improvement
- Make budget and program decisions
- Define how success will be measured
- Demonstrate progress and achievement
- Enhance communication with parents and the public.

Accountability Cycle for Continuous Improvement in Education



Implementation

School boards are responsible for carrying out their education plans and reporting annually to parents, communities and government on use of resources and results. They also are responsible for using results information to update their plans and improve the education their students receive.

Provincial Monitoring and Feedback

Alberta Learning reviews, provides feedback to school boards on their plans and results reports each year and publishes an analysis of findings in order to:

- ensure consistency with key provincial directions
- monitor the implementation of government's accountability policies
- strengthen the linkage between the jurisdiction plan and
  - results report
  - provincial plan
- ensure communication of priorities, intended action and results achieved to parents and the public, and
- provide support for reflective practice and improvement in school jurisdictions and schools.

School board implementation of school-level planning and reporting also is monitored.

Information from board plans and reports is considered in updating the provincial three-year plan and results report, and developing province-wide initiatives and policies for basic education.

Status of school board plans (new)

Reviews of school board plans indicate all school boards in Alberta currently have a three-year education plan in place that is consistent with the provincial directions. As well, the plans include strategies to address priorities for improvement based on performance information. Most plans go beyond the requirements and contain a wealth of information critical for improved performance and for staff and community understanding of jurisdiction priorities and direction.

SCHOOL BOARD THREE-YEAR EDUCATION PLANS

Preparing/Updating School Board Plans

Three-year timeframe

School board plans maintain a three-year time frame and are updated annually. As one year is completed another is added, rolling the plan forward. Adjustments to the plan are made in response to recent performance and changes in the operating environment. It should not be necessary to prepare a completely new plan each year. Every few years the board should revisit and refresh the components of the plan that change little over time, e.g., vision, mission and beliefs.

Considerations and expectations

When updating their plans each year, school boards will need to consider:

- the information in their results report and in the provincial three-year plan and annual results report
- the feedback they receive from Alberta Learning
- the concerns and suggestions from school councils, parents and the public, and
- the allocation of resources to achieve results outlined in the plan when developing their budget

School boards are expected to:

- build on the Ministry vision and mission for lifelong learning
- adapt the provincially required goals and outcomes to reflect the unique characteristics and circumstances of the jurisdiction
- reflect the Alberta Children's Initiative and the Alberta Initiative for School Improvement (AISI) in updating their plan
- include other goals, results, performance measures, and strategies that reflect their local needs and circumstances, and
- consult with parents, staff, school councils, and community and business representatives in the development of their education plans.

Distribution and Communication

School board three-year education plans are public documents approved by the school board. The complete plan is to be on file and available for department monitoring and public review in the jurisdiction office and in schools. The key people responsible for implementing the plan – board staff, school staff and school councils – will need copies. The board is responsible for informing the community of the highlights of the plan, including priorities for improvement and budget summary.

School board technology plans, long-term facilities plans, three-year capital plans, AISI projects and school-level plans supplement the school board plan. These also are to be available for provincial monitoring and public review in the jurisdiction office and schools.

Three-Year Plans are to be updated by May 31 each year.

The updated plans should be placed on the jurisdiction website and notify Alberta Learning by May 31, by e-mail to: measurement.learning@gov.ab.ca

Note: New Section

Implications of Government Reorganization, May 1999

The Ministry of Learning was created in May 1999 from components of the former departments of Education and of Advanced Education and Career Development. This new Ministry has developed a new three-year business plan for learning in consultation with stakeholders, on the internet at http://www.learning.ab.ca This new plan reflects greater emphasis on the learner and the broader scope of the Ministry, stretching from pre-school to adult learning with smooth transitions along the way.

New Goals for the Learning System

School board three-year plans for 2000/01 – 2002/03 are expected to reflect a transition to the new goals in the Alberta Learning business plan. These new goals are clearly related to the former goals, as shown in the table below. This will facilitate the transition of existing jurisdiction plans to the new goal structure.

New Learning System Goals	Former Goals for the Education System
Goal 1: High Quality Learning Opportunities: • Responsive and flexible • Accessible • Affordable	Education is responsive to students, parents and communities. (Goal 2) Children in school have access to the support service they require. (Goal 3) Teaching in Alberta is consistently of high quality. (Goal 4) Information technology is integrated into education to increase efficiency and flexibility of delivery. (Goal 5) The education funding system is fair, equitable and appropriate. (Goal 6)
Goal 2: Excellence in Learner Achievement	Students achieve high standards (Goal 1)
Goal 3: Well-Prepared Learners for: • Lifelong Learning • World of Work • Citizenship	Education is focused on what students need to learn. (Goal 1) Information technology is integrated into education to enhance student learning. (Goal 5)
Goal 4: Effective Working Relationships with Partners	Parents, business and the community have meaningful roles in education. (Goal 2) Children in school have access to the support services they require. (Goal 3) The education system is open and accountable for achievement of results and use of resources. (Goal 7)

Note: Goal 5 – Highly Responsive and Responsible Ministry – does not apply to school boards.

School Board Plan Transition (New)

The new goals and outcomes for school board plans are listed below in the first column. The new outcomes, like the new goals, are broader in scope. The table below shows the relationship of the former school board results to the new outcomes. It is expected that, in this transition year, school board plans for 2000/01 to 2002/03 will reflect the new goals, some of the new outcomes and some of the former results. School boards will make the full transition to the new outcomes in the following year for their 2001/02 to 2003/04 plans.

New Goals and Outcomes for School Board Plans	Former Results for School Board Plans
Goal 1 High Quality Learning Opportunities – Responsiveness, Flexibility, Accessibility, Affordability • The learning system is flexible and provides a variety of programs and modes of delivery. • The learning system meets the needs of all learners, society and the economy. • All Albertans can participate in learning. • Albertans with special needs can participate in learning. • Financial need is not a barrier to participating in learning opportunities. • The learning system is affordable.	• Parents and students can choose schools and programs within the public education system. [AE Goal 2] • Information technology expands choice and flexibility in what, when, where and how students learn. [AE Goal 5] • Teachers' professional growth focuses on the knowledge, skills and attitudes required to meet the diverse learning needs of all students. [AE Goal 4] • Teachers are able to integrate information technology into instruction and management of student learning. [AE Goal 5] • All schools are safe and caring. [AE Goal 3]
Goal 2 Excellence in Learner Achievement • Learners demonstrate high standards across a full range of areas (optimizing full potential). • Learners complete programs.	• Students achieve provincial standards. [AE Goal 1] • Teachers help students achieve provincial learning expectations and high standards. [AE Goal 4]
Goal 3 Well Prepared Learners for Lifelong Learning, World of Work, and Citizenship • Children start school ready to learn. • Learners are able to learn continuously: in school, at work and in society. • Learners' achievement is recognized. • Learners are successful in finding and maintaining employment. • Learners have the knowledge, skills and attitudes to become contributing members of society. • Learners have an awareness of the increasing global interdependency.	• Students acquire the education they need to prepare them for work, further studies and citizenship. [AE Goal 1] • Students have the information technology skills needed for ECS-12 learning, work and post-secondary studies. [AE Goal 5]
Goal 4 Effective Working Relationships with Partners • Joint initiatives meet the learning needs of Albertans. • Partners are satisfied with the effectiveness of partnerships.	• Parents, business and the community have meaningful roles in education. [AE Goal 2] • Services for children are coordinated at the jurisdiction and local levels. [AE Goal 3] • Parents and the community have timely and meaningful information about education, including student achievement and expenditures, from the school board and its schools. [AE Goal 7]

Note: The results statements in the second column suggest areas for developing strategies to achieve the new outcomes in the first column.

Elements of School Board Plans

The elements of the school board three-year education plan, listed below, are inter-related. The school board uses information about what and where a school board is (mission, beliefs, profile, issues and trends, current performance levels) to help determine where the school board would like to be (vision, goals, outcomes), how achievement of outcomes will be assessed (performance measures and targets), and what actions will be taken (strategies) and how resources will be allocated (budget) to achieve the desired goals. Required elements are identified.

Vision

Vision – *an ideal to strive for, a preferred future.*

- The vision statement looks to the future and describes the fundamental characteristics of education, e.g., describes where the school board wants to be, what its students will have achieved, and what its services and programs for students will look like over the longer term.
- School authority vision statements are consistent with the new provincial vision for education:

  "Optimizing human potential."

Mission

Mission – *a clear, concise statement of overall purpose and role.*

- The mission statement gives focus to all the programs and services a school board provides for students.
- School authority mission statements are consistent with the new provincial mission for the education system:

  "Alberta Learning's leadership and work with partners build a globally recognized lifelong learning community that enables Albertans to be responsible, caring, self-reliant and contributing members of a knowledge-based and prosperous society."

Principles and/or Beliefs

Principles/beliefs - *reflect the values of the organization and what it stands for.*

- Statement of principles and beliefs serve to guide all decision making and provide a foundation for the development of the mission, vision, and goals.
- School board principles/beliefs must be consistent with the principles for the ECS-12 system: access to quality education, equity, flexibility, responsiveness and accountability.

Profile

Profile - *brief description of the jurisdiction*

- Overviews jurisdiction characteristics, e.g., the students and the community it serves, the programs provided, the location.
- Briefly describes the context in which education takes place in the school jurisdiction.

Issues and Trends

Issue - *an existing or emerging condition that could interfere with ability to fulfill a mandate or achieve goals*

Trends - *directions of data established over time*

- Issues and trends help to identify opportunities and challenges facing the school jurisdiction that need to be taken into account in planning, budgeting, assessing progress and reporting.
- At least 3 to 5 years of data are needed to show a trend.

Priority Areas for Improvement (Required)

Priorities for improvement - *important outcomes where performance does not meet expectations*

- Identified from performance measures information
- Provincial priority areas:
  - improving secondary student achievement in mathematics
  - increasing high school completion rates
  - improving co-ordination of services for children (the Alberta Children's Initiative provides a framework to guide joint planning and service delivery to improve children's services)
  - improving access to information technology
  - improving public satisfaction with education

School jurisdictions identify and address local priorities for improvement based on their results.

Goals (Required)

Goals – *broad statement of desired conditions or aims to work toward over the long term to realize an organization's vision and to fulfill its responsibilities.*

- Developed by the province to establish direction for the learning system overall
- Designed to help realize the vision and change little over time

- Provincial goals (see page 7) may be restated or related to jurisdiction goal statements to reflect the school board perspective; rewording of a required goal should retain its original intent.
- Other goals to address local needs and circumstances, as determined by the school board and its community, may be included in the plan.

Outcomes (Required)

Outcomes - *Measurable statements of what will be achieved*

- Answer the question, "What will this look like when we get to where we want to be?"
- Expressions of intended or desired outcome, e.g., "students achieve…", "teachers use…", not to be confused with performance measures (see below).
- Required outcomes (see page 8) may be restated or related to jurisdiction outcomes (previously results) to reflect local needs and conditions; rewording of a required outcome should retain its original intent.
- There must be at least one outcome for each local goal.
- For provincial goals, boards may specify additional outcomes.
- Each outcome needs a corresponding performance measure (see below); however, one performance measure may provide data for more than one outcome.

Performance Measures (Required)

Performance measures - *used to assess and report on achievement*

- Answer the question "To what extent are we achieving our outcomes?"
- Performance measures are typically expressed in quantifiable terms, e.g., "number of…", "percentage of…".
- Required performance measures (related to the outcome in the learning system goal 2 – learners demonstrate high standards):
    - Percentages of students (excluding home education) who achieved the acceptable standard and percentages of students who achieved the standard of excellence on provincial achievement tests in Grades 3, 6 and 9 (five years of results) based both on those writing and the cohort (total enrollment in grade) in relation to jurisdiction targets, provincial results and provincial standards.

Plan requirements (continued)

- Reporting on home education students in Grades 3, 6, and 9 (under development).
- Work is underway to develop mechanisms to expand reporting on the achievement of students who do not write the provincial achievement tests.
- Percentages of students who achieved the acceptable standard and percentages who achieved the standard of excellence on diploma exams.
- Participation rate: percentages of students in grades 3, 6 and 9 who wrote provincial achievement tests and student participation in diploma exam courses.

- Locally determined performancemeasures for:
  - all other provincial and local outcomes
  - provincial and local priority areas for improvement
- Progress and achievement of specific groups of students, related to Provincial Initiatives:
  - Early Literacy
  - ESL
  - Students with special needs (e.g., student achievement of expectations in the IPP)

See Appendix 4, page 29 for more information about the purpose and characteristics of performance measures.

Targets (Required for provincial achievement tests and diploma exams)

Targets - *desired level of performance to be attained by a certain time*

- Targets are a strategic tool to help school boards focus on maintaining or improving results.
- Recent performance is used to set the targets to be achieved by the end of the next three-year plan.
- Quantitative targets are required for provincial achievement tests and diploma exams.
- Other targets can be set at the board's discretion. These can be quantitative (numerical) or qualitative – indicate a direction, e.g., "maintain", "improve."
- School board targets should be set in consultation with schools, parents and the community. (See Appendix 3, pages 27-28, for more information on local target setting.)

Strategies (Required)

Strategies - *actions taken in the short to medium term (1 to 5 years) to achieve goals and desired outcomes.*

- Strategies are expressed in action-oriented terms, e.g., "develop..." "implement...", "assist...", "work with".
- School boards develop strategies for each plan goal to address provincial and jurisdiction priorities for improvement, learning needs of specific groups of students, and local issues, trends and opportunities.
- Strategies do not need a corresponding performance measure.

Related Board Planning (Required)

New Section

- Briefly describes purpose and major projects of related board plans
- Indicates how related plans support the jurisdiction's educational programs and are related to the goals and priorities of the three-year education plan, including:
  - Long-term facilities plan
  - Three-year capital plan
  - Technology plan
  - AISI projects
- Communicates easily to parents and the public

Budget Highlights (Required)

- The board's budget reflects and supports the education plan.
- Includes summary budget information such as allocations to major spending categories (i.e., instruction, administration, operations and maintenance, and capital)
- Communicates clearly to parents and the public.
- Indicates where and how the public may review/access the jurisdiction budget.

NOTES:

SCHOOL BOARD ANNUAL EDUCATION RESULTS REPORTS

The AERR tells us where we are in relation to where we want to be

Preparing Annual Education Results Reports

The school board annual education results report (AERR) accounts to the public and government for the education of students and use of resources.

The AERR highlights progress, accomplishments and results achieved in the past year as a result of implementing the jurisdiction education plan. Analyzing and reporting on results achieved are critically important to the accountability cycle. The analysis shows where performance is strong and identifies areas needing improvement to be addressed in the annual update of the jurisdiction three-year plan. The report not only communicates performance information to the public, but also demonstrates that the board is using results information in decision-making.

Distribution and Communication

Public reporting of performance

Reporting to the public on performance enables school boards to demonstrate accountability for student achievement and use of resources to address improvement priorities.

Boards determine the format(s) for effective communication of performance information to their community, e.g., newspaper insert, brochure, web posting, etc. Boards also must make the complete AERR and Audited Financial Statement available to the public upon request.

A copy of the AERR must be placed on the jurisdiction website by **November 30** each year and notify Alberta Learning by e-mail to: measurement.learning@gov.ab.ca

Elements of School Board Annual Education Results Reports

Contextual Information

AERR November 2001

- Briefly explains the environment in which outcomes were achieved.
- Provides descriptive information such as student and community characteristics and circumstances affecting results achieved.
- Does not have to be a separate section; contextual information can be integrated throughout the report.
- Enhances understanding of quantitative results.

AERR November 2001
(contindued)

Progress and Accomplishments

- Briefly describes board's progress in implementing its three-year plan.
- Highlights the accomplishments of the jurisdiction over the past school year, e.g., implementation of a new program or policy, focus of teacher in-service, technology upgrades.
- Could include the required accounting to the public on implementation of the Teacher Growth, Supervision and Evaluation Policy.

Performance Measures Information (Required)

- Reports and evaluates performance measure information related to outcomes for each goal of the board's three-year plan.
- Provides quantitative information on performance measures, including:
  - Percentages of students (excluding home education) who achieved the acceptable standard and percentages of students who achieved the standard of excellence on provincial achievement tests in Grades 3, 6 and 9 (five years of results) based both on those writing and the cohort (total enrollment in grade) in relation to jurisdiction targets, provincial results and provincial standards.
  - Reporting on home education students in Grades 3, 6, and 9 (under development)
  - Work is under way to develop mechanisms to expand reporting on the achievement of students who do not write the provincial achievement tests.
  - Percentages of students who achieved the acceptable standard and the percentages who achieved the standard of excellence on diploma exams (five years of results in relation to jurisdiction targets and provincial standards.
  - Participation rates: percentages of students in grades 3, 6 or 9 who wrote provincial achievement tests and student participation in diploma exam courses.

Notes:

1. For the above measures on student achievement and participation, the Learner Assessment Branch provides multi-year reports by school and school jurisdiction.
2. The provincial achievement standards for diploma examinations: 85% of students are expected to achieve the acceptable standard and 15% of students are expected to achieve the standard of excellence. Standards for achievement tests are under review.

AERR requirements (continued)

- Reporting on local quantitative and qualitative outcome measures for provincial priority areas for improvement.

  Note: The latest provincial results related to the provincial priorities for improvement are provided in Appendix 6, page 32.

- Reporting on the progress and achievement of specific groups of students – related to Provincial Initiatives: Early Literacy, ESL and students with special needs (e.g., the extent these students meet the goals of their IPP).

- Summarize results achieved on AISI funded projects.

- Reporting the information from local quantitative or qualitative outcomes measures for all outcomes in the jurisdiction plan.

- Three to five years of trend data for all measures, if available, including latest available survey information.

- Overall assessment of measures information, including progress and priorities for improvement based on results.

- Any deletions or substitutions of local measures need to be noted and briefly explained.

  Note: Boards may find that a measure listed in their plan does not provide meaningful information or the information is too costly or difficult to gather. Boards can drop or replace such a measure in their next plan and indicate this change in their AERR. If a better measure has already been identified and information is available, this can be reported in the AERR instead.

- As noted in the context section, descriptive and explanatory information can be provided to supplement the quantitative reporting on measures to enhance staff and community understanding of the quantitative information.

Capital/Facilities Projects Summary (Required)

New AERR Section

- Highlights progress on or completion of major facilities projects.

- Indicates how these projects support or enhance learning for students.

AERR requirements (continued)

Financial Summary (Required)

- Summarizes school board spending for the previous school year based on the Audited Financial Statement.
- Information should be concise and easily understood by parents and the public; this can be in graph or table form.
- Includes total spending per student per year and operational spending per student per year.

  For consistent reporting of per-student spending across school jurisdictions:

  - Calculate total spending per student by dividing total expenses for the year (AFS Schedule 1) by total FTE enrollment. Using September 30 actuals, calculate total FTE enrollment by adding total enrolled students grades 1-12 and FTE enrollment in ECS.
  - Calculate operational spending per student using AFS Schedule 1; divide total expenses for the year minus amortization of capital assets and interest on capital debt by total FTE enrollment. (See above for explanation of calculating FTE enrollment.)

- Indicates where and how detailed budget and expenditure information may be obtained.

See Appendix 7, page 32, for the reporting requirements for the November 2000 AERR.

Future Challenges

- Briefly describes major issues, concerns and priorities for the board over the next few years.
- Indicates emerging issues and trends facing the jurisdiction that need to be addressed.

  See pages 46-47 in the *Fifth Annual Results Report on Education1999*, for an example of Future Challenges.

SCHOOL THREE-YEAR EDUCATION PLANS AND ANNUAL RESULTS REPORTS

School Planning and Reporting

Authority for school planning and reporting requirement

The provincial requirements for school education plans and results reports were initially outlined in the *Accountability in Education: Policy Framework* released by the Minister of Education in June 1995.

Purpose of school planning and reporting

School planning and reporting to the public, consistent with school board and provincial directions, ensure that the entire education system focuses on key improvements and the educational needs of students.

School planning, budgeting, assessing, and reporting are integral components of school board planning and school-based decision making. School boards are responsible for developing policies, processes or requirements for school planning and reporting to enable continuous improvement of school results. School boards are monitored for implementation of school planning and reporting in their jurisdiction.

Provincial Requirements for School Plans

School plans are to be updated annually and communicated to parents and the public. These plans are to reflect the following provincial goals by 2001/02 – 2003/04 (optional for 2000/01 – 2002/03 school plans):

Phase in of new learning system goals

Goal 1: High Quality Learning Opportunities:

- Responsive and flexible
- Accessible
- Affordable

Goal 2: Excellence in Learner Achievement

Goal 3: Well-Prepared Learners for:

- Lifelong Learning
- World of Work
- Citizenship

Other school plan requirements

Goal 4: Effective Working Relationships with Partners

For each goal, school plans are to include:

- Strategies
- At least one outcome and related performance measure
- Additional goals, strategies, outcomes and performance measures to reflect local needs and the advice of the school council.

(See pages 11-13 for information on goals, strategies, outcomes and performance measures).

School plan requirements (continued)

For Goal 2 (Excellence in Learner Achievement):

- provincial achievement tests and diploma examinations are required performance measures.
- Targets are required for achievement tests and diploma exams. (Targets for other performance measures are optional. See pages 12-13 and Appendix 3, pages 27-28, for information on target setting).

Note: The items listed above are a minimum set of requirements for school plans mandated by the province. Schools are encouraged to include in their plans all relevant elements of a comprehensive education plan (see pages 10-13). School boards are expected to designate additional planning requirements for their schools.

Provincial Requirements for School Annual Results Reports

Schools are to report annually to parents and the public on student achievement and use of resources. Information on the following performance measures must be included:

Required performance measures

- Five years of achievement test and diploma examination results based on those writing in relation to local targets, provincial results and provincial standards (under review for achievement tests). See page 17 for information on provincial standards and Appendix 3, pages 27-28, on local target setting.
- Percentages of students in grades 3, 6 and 9 who wrote provincial achievement tests and student participation in diploma examinations.

Notes:

1. For the above measures on student achievement and participation, the Learner Assessment Branch provides multi-year reports by school and school jurisdiction.
2. The provincial achievement standards for diploma examinations: 85% of students are expected to achieve the acceptable standard and 15% of students are expected to achieve the standard of excellence. Standards for achievement tests are under review.

- Other measures listed in the school's three-year plan.

Note: The above reporting requirements constitute the minimum set mandated by the province. School boards are expected to designate additional reporting requirements for their schools, and schools are encouraged to report on key aspects of education that are important to parents and the public in their communities, e.g., parent and public satisfaction with education, safe and caring schools.

APPENDICES

Legislative Authority

The provincial government developed a comprehensive concept of accountability which expanded the focus from accounting for dollars spent to include accounting for results achieved. Accountability for performance involves developing plans to make best use of resources available, assessing results to determine if expectations are being met, identifying where improvement is needed, and reporting the results to the public.

This expanded concept of accountability, applying to government departments and funded agencies and organizations, was established in legislation in 1995. The Government Accountability Act (GAA) requires government departments and school boards as well as other public agencies to prepare plans and report on results.

The accountability cycle for the basic education system (*Accountability in Education – Policy Framework,* June 1995) was developed to describe the application of government's comprehensive concept of accountability to the education system. This cycle focuses on continuous improvement and on the linkage of school board plans and reports to each other and to provincial directions for the learning system, as reflected in the School Authority Accountability Policy, 2.1.1 (*Policy, Regulations and forms Manual*, on-line at www.learning.gov.ab.ca).

A variety of documents essential for school system operations are available on the department's website, such as the three-year business plan for the learning system, the Guide to Education, the Program of Studies and the Funding Manual. The Government Accountability Act and the School Act are available on the Queen's Printer website linked from the on-line Policy Manual Table of Contents, or at www.gov.ab.ca/qp/.

Alberta Learning's website also provides information to enhance board planning and reporting, such as the provincial surveys of parents, high school students and the public, and the summaries of the reviews of school board plans and AERRs.

Basic Education in Alberta – The Definition

(Ministerial Order No. 004/98)

A basic education must provide students with a solid core program including language arts, mathematics, science and social studies. Students will be able to meet the provincial graduation requirements and be prepared for entry into the workplace or post-secondary studies. Students will understand personal and community values and the rights and responsibilities of citizenship. Students will develop the capacity to pursue learning throughout their lives. Students also should have opportunities to learn languages other than English and to attain levels of proficiency and cultural awareness which will help to prepare them for participation in the global economy.

Student Learning Outcomes

Students are expected to develop the knowledge, skills and attitudes that will prepare them for life after high school. A basic education will allow students to:

- Read for information, understanding and enjoyment.
- Write and speak clearly, accurately and appropriately for the context.
- Use mathematics to solve problems in business, science and daily-life situations.
- Understand the physical world, ecology and the diversity of life.
- Understand the scientific method, the nature of science and technology, and their application to daily life.
- Know the history and geography of Canada and have a general understanding of world history and geography.
- Understand Canada's political, social, and economic systems within a global context.
- Respect the cultural diversity and common values of Canada.
- Demonstrate desirable personal characteristics such as respect, responsibility, fairness, honesty, caring, loyalty, and commitment to democratic ideals.
- Recognize the importance of personal well-being and appreciate how family and others contribute to that well-being.
- Know the basic requirements of an active, healthful lifestyle.
- Understand and appreciate literature, the arts and the creative process.
- Research an issue thoroughly and evaluate the credibility and reliability of information sources.
- Demonstrate critical and creative thinking skills in problem solving and decision making.
- Demonstrate competence in using information technologies.
- Know how to learn and work independently and as part of a team.
- Manage time and other resources needed to complete a task.
- Demonstrate initiative, leadership, flexibility, and persistence.
- Evaluate their own endeavours and continually strive to improve.
- Have the desire and realize the need for life-long learning.

Standards for Student Learning

The Minister of Education defines acceptable standards and standards of excellence for student achievement in consultation with Albertans. Employers are involved in specifying the knowledge, skills and attitudes needed in the workplace. Schools, school authorities and the Minister of Education assess and report regularly to the public on a range of student learning.

The school's primary responsibility is to ensure that students meet or exceed the provincial standards as reflected in the Student Learning Outcomes (outlined above), the Alberta Programs of Study, provincial achievement tests, diploma examinations and graduation requirements.

Education Delivery

Schools must engage students in a variety of activities that enable them to acquire the expected learnings. Schools have authority to deploy resources and may use any instructional technique acceptable to the community as long as the standards are achieved. Schools, teachers and students are encouraged to take advantage of various delivery options including the use of technology, distance learning and the workplace.

Schools play a supportive role to families and the community in helping students develop desirable personal characteristics and the ability to make ethical decisions. Schools also help students take increasing responsibility for their learning and behaviour, develop a sense of community belonging and acquire a clearer understanding of community values and how these relate to personal values.

Students learn basic, transferable knowledge, skills and attitudes in school. Schools, in co-operation with employers, provide opportunities for students to develop and practice employability skills. The Minister of Education provides credit for off-campus learning that is approved and accepted by the school and the employer. Government works with schools, employers and post-secondary institutions to help young people make a smooth transition to work and further study.

Setting Local Targets for Student Achievement

Targets and Planning

A target is a desired level of measurable or observable performance to be attained by a specified time. Targets are an implicit part of any goal. While a school's or school authority's educational goals point out the directions for people's efforts, targets describe in specific terms what will be accomplished by a certain time. This allows people to assess whether they are heading where they intended to go, and how well they are moving toward their desired outcomes. Assessment of progress in relation to a target may also lead to the recognition that a different target would be more helpful in guiding your school's or school authority's efforts toward a particular goal. By identifying immediate, reachable outcomes, targets encourage teachers, students, administrators, and their community to believe that distant goals are attainable.

Viewed in this way, targets can be a valuable part of your school or school authority plan. Your mission, mandate, values and beliefs, and long-range goals all provide a context for setting specific targets. Similarly, past accomplishments are helpful indicators of what specific targets may be most appropriate. This is why achievement test and diploma examination results, as well as results of various other local assessments, are relevant in target setting.

Local Focus

Quantitative targets for student achievement on the provincial achievement tests and diploma examinations are required in school and school authority education plans. School authority targets provide a framework for each school in the jurisdiction to use in setting school targets. District targets will be most helpful if they take into account the variations in overall student achievement from school to school.

Systematic interpretation of school results from provincial achievement tests and diploma examinations will reveal where students need more help in order to continue learning successfully. This can be the beginning point for setting district and school targets for student performance on the tests for the next year or two.

Local targets should be realistic and achievable, based on past performance. It is possible that local targets would be different from provincial standards. Staff in each school will be able to identify what percentage of their students reasonably can be expected to achieve the provincial standard in a particular test or examination within the time specified in the targets. An important part of this decision is agreeing on how resources and people can support the targets.

Tips for Setting Local Targets

- Consider past and desired participation rates in achievement tests and diploma examinations.
- Focus on a limited number of areas. For example, emphasize one or two subjects in which weaknesses in student performance are across grades. It may be reasonable to set "hold the line" targets in other areas temporarily.
- Set targets in relation to other targets. It is important to ensure that achievement of one target does not jeopardize the achievement of another. For example, student participation rates for achievement tests and diploma examinations should not decrease because of a desire to improve school or authority results.
- Work collaboratively across grades in a school. Students' performance on an achievement test or diploma examination reflects their learning over the years. Teachers in all grades can contribute important insights and assistance in setting targets.

- Use the school reports on achievement test or diploma examination results to identify what aspects of a subject or course need attention, and use this information to plan targets.
- Emphasize what students need, in order to succeed, rather than focusing on problems that keep students from achieving at the levels expected provincially.
- Expect to set different targets in different grades and subjects/courses, depending on past results and current priorities and resources.
- Work collaboratively at the jurisdiction level, to identify areas of common strength or weakness across different schools and to determine targets for the district that can encourage all schools.
- Interpret targets to students and parents so that they are part of the school-wide effort to achieve targets.
- Report to students and parents on student achievement in relation to targets.

Targets in Perspective

Provincial tests, though providing a common standard and important information about students' learning, are only one of many measures for evaluating the effectiveness of schools and school authorities.

School authorities and individual schools may find it helpful to set targets for other indicators of student achievement, and for areas other than student achievement. Examples include:

- completion of programs
- satisfaction reported by students or parents
- involvement of parents or others from the community in schools
- student involvement in the community or in extra curricular activities.

These other targets can either be quantitative (e.g., "by 2003, 80% of students") or qualitative (e.g., "improve..." or "maintain...").

Through its targets, each school authority or school, together with parents and members of the community, can highlight priorities that exist locally for a given year and commit to achieving certain results.

Insofar as target setting complements other strategies for improving student learning, your targets are likely to contribute to student learning and to the overall effectiveness of schooling in your community.

Performance Measurement (Revised)

Performance measures in school board plans and results reports provide information on achievement of outcomes that reflect key aspects of the education system. This information is an essential part of accountability that enables the jurisdiction to:

- assess and report on progress, what's working well, what needs improvement
- determine priorities for improvement and set improvement targets
- make program and budget decisions to maintain good performance and improve performance in areas of weakness.

Measures typically provide quantifiable information on key aspects of education. This information is generated quantitatively through tests and data analysis or through qualitative means, such as observation, interviews, portfolio reviews. Whether quantitative or qualitative, measures demonstrate observable change.

To be meaningful, measures information is obtained regularly (e.g. annually) and is normally expressed in percentages, ratios, or numbers in relation to a total.

Types of Performance Measures

- **Outcome measures:** provide information on progress toward desired results in key areas - effectiveness of programs, impacts on clients.

The measures in school board plans and results reports focus on outcomes and constitute the core set for assessing and reporting on progress and achievement.

Other types of measures, listed below, are important for managing resources, providing programs and services and reporting contextual information:

- **Intermediate outcome measures**: For some desired outcomes, results may not be known for several years. In such instances, it is useful to measure intermediate steps – milestones or landmarks - toward the desired outcome.
- **Output measures**: information on number of clients served and types of services provided.
- **Process measures**: information on activity and efficiency. These measures indicate demand for services and cost per unit of providing service.
- **Input measures**: information on resources allocated to programs, such as funding, personnel, equipment. These measures provide information on cost of providing programs and services.

Characteristics of good performance measures

Good performance measures provide information that is:

- Understandable – clear and sufficient to provide an understanding of the organization or system to staff, community and government
- Valid – meaningful and credible (sound, defensible)
- Relevant and appropriate – timely, related to important aspects
- Reliable – unbiased, error free and verifiable
- Comparable – show change over time and/or among similar organizations
- Discrete – provides information in distinct, non-overlapping categories
- Empowering – useful for decision making, promote improvement
- Practical – can be reliably assessed with reasonable effort

Sources:

Alberta Treasury, *Measuring Performance: A Reference Guide*, September 1996. On the internet at http://www.treas.gov.ab.ca. Click on Performance Measurement Home page.

Alberta Auditor General, *Government Accountability*, February, 1997. On the internet at http://www.oag.ab.ca/. Click on the Reading Room.

Conducting Surveys

Some local measures may require surveys of parents, students, staff and other community members.

To be manageable, surveys can be done on a random sampling basis or rotated among schools or stakeholder groups over a three-year period.

If boards use the same questions as are used in Alberta Learning's annual surveys of a stratified random sample of parents, students and tahe public, local results can be considered in relation to provincial results. The questions asked in the Ministry's 1999 and 2000 surveys of students, parents and the public are available on the internet at (http://www.learning.gov.ab.ca).

While surveys do not have to be done annually, the latest available survey information should be reported in the AERR each year along with trend data (information on the same questions from surveys done in previous years), if available.

The Alberta Auditor General's Office has prepared a resource on conducting surveys for the Alberta public sector: *Client Satisfaction Surveys*, October 1998. This document is available on the internet (http:www.oag.ab.ca/pd/clientsatisfaction.pdf).

Two resources were prepared for Alberta Education in 1995 to provide guidance to school jurisdictions on conducting satisfaction surveys:

- Environics West, *Pilot Project Report:* This report compares two methods of conducting surveys of parents, teachers and students: telephone interviews and mailed, self-administered questionnaires (http://www.learning.gov.ab.ca).

- Environics West, *Telephone and Self-Completed Satisfaction Surveys: Training Manual:* This manual provides advice on selecting samples and conducting telephone and mailed surveys (http://www.learning.gov.ab.ca).

Provincial Results for Provincial Priority Areas for Improvement

Percentage of students who achieved the acceptable standard on the Grade 9 provincial achievement test and the diploma exams in mathematics and are the percentage who achieved the standard of excellence.

	1994/95	1995/96	1996/97	1997/98	1998/99	Standard
Grade 9 writing						
acceptable	—	—	—	71%	72%	under
excellence	—	—	—	14%	15%	develop-
Grade 9 enrolled						
acceptable	—	—	—	63%	64%	ment
excellence	—	—	—	12%	14%	
Math 30						
acceptable	73%	74%	75%	82%	82%	85%
excellence	16%	19%	19%	23%	24%	15%
Math 33						
acceptable	—	79%	81%	73%	73%	85%
excellence	—	19%	18%	12%	13%	15%

- Percentage of students who completed high school within six years of Grade 9.

1994/95	1995/96	1996/97	1997/98	1998/99	Target
69%	69%	69%	70%	70%*	75%

*preliminary

- Percentage of parents of children with severe special needs who are satisfied with services for their child.

1998	1999	Target
79%	78%	85%

- Percentage of students and parents who report school helps improve students' computing skills.

	1995	1996	1997	1998	1999	Target
Students	62%	65%	62%	64%	70%	80%
Parents	—	—	—	67%	80%	80%

- Percentage of students and parents satisfied with student access to computers in school.

	1999
Students	82%
Parents	74%

- Student/instructional computer ratio.

1997/98	1998/99
8.6	7.7*

*preliminary

- Percentage of the public who are satisfied with quality of education in schools.

1998	1999	Target
70%	66%	75%

Reporting Requirements for School Board November 2000 AERR

Required Elements

Results achieved on provincial and local goals:

- Reports information on required (see below) and local performance measures listed in the school board plan for 1999/2000 to 2001/2002 (May 1999) for each goal.
- Notes any changes in measures between the May 1999 plan and information reported in November 2000.
- Evaluates overall progress in each goal area and identifies continuing and new improvement areas from performance measure information to be addressed in the next plan update.

Financial summary (see next column)

Required Performance Measures

Goal: Education is focused on what students need to learn and students achieve high standards.

- Percentages of students (excluding home education) who achieved the acceptable standard and percentages of students who achieved the standard of excellence on provincial achievement tests in Grades 3, 6 and 9 (five years of results) based both on those writing and the cohort (total enrollment in grade) in relation to jurisdiction targets, provincial results and provincial standards (under review).
- Reporting on home education students in Grades 3, 6, and 9 (under development)
- Percentages of students who achieved the acceptable standard and the percentages who achieved the standard of excellence on diploma exams (five years of results), in relation to jurisdiction targets, provincial results and provincial standards.
- Participation rates: percentages of students enrolled in grades 3, 6 or 9 who wrote provincial achievement tests and student participation in diploma exam courses in relation to provincial participation rates.

Notes:

- For the above three measures on student achievement and participation, the Learner Assessment Branch provides multi-year reports by school and school jurisdiction.
- The provincial achievement standards for diploma examinations: 85% of students are expected to achieve the acceptable standard and 15% of students are expected to achieve the standard of excellence. Standards for provincial achievement tests are under review. Work is underway to expand reporting of student achievement in future years.

- Reporting on the local outcome measures on the progress and achievement of specific groups of students related to provincial initiatives: Early Literacy, English as a Second Language programs and special education programs.

Other Goals:

- Report data on all local measures for all other goals and results in the May 1999 school board plan.

Financial Summary:

- An easily understood spending summary for the school year just completed based on the AFS, including:
- Overall spending per students per year
- Operational spending per student per year
- Indicate where and how detailed budget and expenditure information may be obtained.

Note: For consistent reporting of per-student spending across school jurisdictions:

- Calculate total spending per student by dividing total expenses for the year (AFS Schedule 1) by total FTE enrollment. Using September 30 actuals, calculate total FTE enrollment by adding total enrolled students grades 1-12 and FTE enrollment in ECS.
- Calculate operational spending per student using AFS Schedule 1; divide total expenses for the year minus amortization of capital assets and interest on capital debt by total total FTE enrollment. (See above for explanation of calculating FTE enrollment.)

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